Create a Public Notice Solicitation

Step-by-Step Instructions for Creating a Public Notice Solicitation

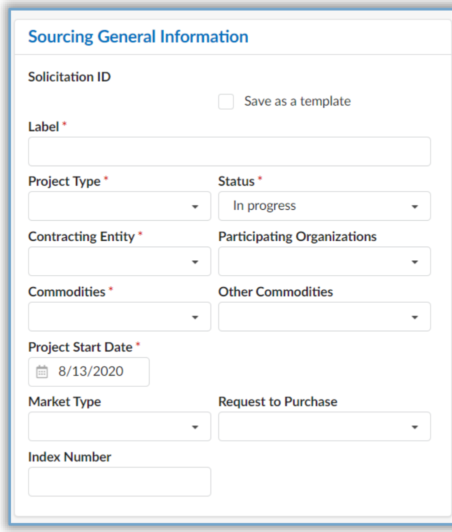
1

A Public Notice Solicitation notifies the public of a solicitation that will be evaluated and awarded outside of OhioBuys. To create a Public Notice Solicitation, log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Create Sourcing Project** from the drop-down menu.

⚠ Agency Sourcing Associates, Contract Analysts, and Procurement Managers are able to create and post public notice solicitations.

2

The Create Sourcing Project page is displayed. On this page, you will need to complete the **Sourcing General Information** section. Note that any fields with a red asterisk are mandatory and must be completed to continue.



a) Update the **Label** field with the name for the sourcing project. This field is visible to Suppliers and must contain a brief, straightforward description of the purpose of the solicitation. If creating the solicitation from a purchase requisition, this field will default to the purchase requisition label and should be updated so that the needs of the solicitation are easily understandable for potential Bidders and/or Suppliers.

b) Select a **Project Type** of *Public Notice.*

c) Indicate the **Status**. This field should always be left as *In Progress*.

d) Select the **Contracting Entity**. This field is typically the agency or Co-op responsible for initiating the solicitation.

e) Add any additional **Participating Organizations** if applicable. These are the organizations that are allowed to access and purchase items from the solicitation.

e) Add the relevant **Commodities** and **Other Commodities** to the solicitation. The selections made here will drive which potential Bidders and/or Suppliers are shown on the Add Suppliers tab. Note that other Suppliers can still be invited to participate even if their profile does not list the commodities associated with the solicitation.

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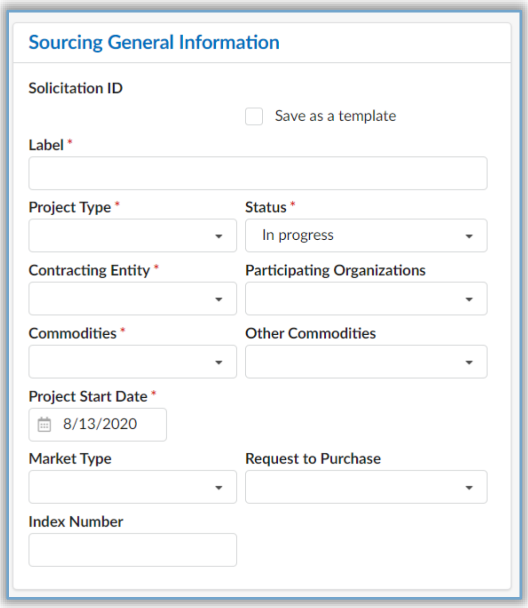


f) Indicate the **Project Start Date**. This will default to the date the project is created, but can be retroactively or future dated if required..

g) Use the **Market Type** field to indicate the type of Suppliers that will be involved in the solicitation

h) If there is a **Request to Purchase** associated with the solicitation, you can search for it and select it from the drop-down menu.

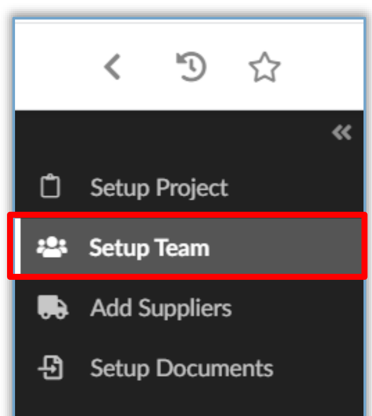
i) Input the **Index Number** if there is one associated with the solicitation. An index number is a short contract designator, often represented by three letters followed by three numbers.

3

Click **Save**.

4

Navigate to the **Setup Team** tab.



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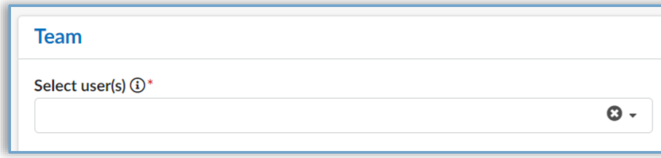
The **Team** page is displayed. To add a team member, click in the **Select Users** field and type in the user's name, then select it when it appears from the drop-down menu.



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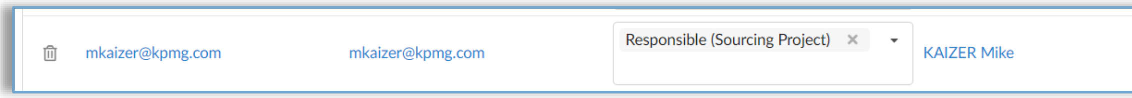


Select a team member's role under the Profile header. Available roles include:

a) **Ad-hoc Approver (Sourcing Project)**: Acts as an additional approver before the Posting Approver when posting a solicitation.

b) **Contributor (Sourcing Project)**: Can update the solicitation with additional information.

c) **Evaluator (Sourcing Project)**: Can evaluate Supplier responses to a solicitation. Note this is not used for public notice solicitations.

d) **Posting Approver**: Reviews and approves the solicitation prior to posting.

⚠ If assigning a Posting Approver, the **Posting Approval Required** field on the Prepare Solicitation tab must be set to **Yes**

e) **Records Review**: Reviews solicitation documents prior to them being publicly posted, to ensure the proper files are posted (e.g., redacted documents). Note this is not used for public notice solicitations.

f) **SME (Sourcing Project)**: Can review and update certain aspects of the solicitation based on their subject matter expertise.

⚠ Note: Users can be assigned multiple roles.

⚠ To remove a role, click the **X** icon to its left.

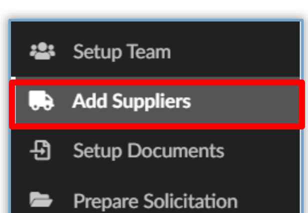
⚠ To remove a user from the team, click the **Trashcan** (🗑) icon to the left of the user's email address.

7

Repeat steps 5 and 6 to add the remaining team members to the solicitation as needed. When you are done, click **Save**.

8

Navigate to the **Add Suppliers** tab.



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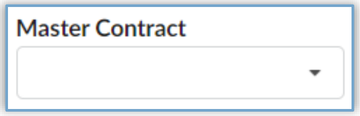
If applicable, indicate the **Master Contract** for the solicitation. This will automatically add all Suppliers associated with the Contract to the list of invited Suppliers.



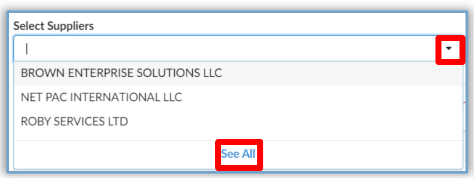
⚠ This is most commonly used when a contract has already been awarded to a pool of pre-qualified Suppliers and secondary solicitations amongst those Suppliers are required before a purchase can be made

10

Inviting Suppliers gives the Supplier the ability to see the solicitation and respond when they log into the application. Suppliers not invited will have to locate the solicitation on the public portal first and click the 'Participate in RFx' button to gain access to it. Going forward, OhioBuys will automatically notify all Bidders and/or Suppliers who have a commodity on their profile that is in the same category as the commodity or commodities listed on the solicitation.

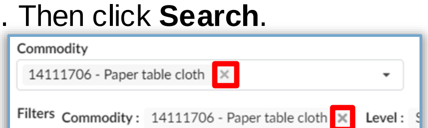
⚠ Note that while commodity Suppliers are notified, only selected Suppliers are specifically invited to participate in the solicitation.

Click the **Selector** (▾) icon on the **Select Suppliers** field. By default this drop-down will display all of the Bidders and Suppliers who have set their account up with the relevant commodity code(s) in OhioBuys. To add additional Bidders and/or Suppliers, click **See All.**



After clicking **See All**, a list of potential Bidders and/or Suppliers is displayed. By default this list will be filtered to only show Bidders and/or Suppliers who offer the commodity for your solicitation. Users can refine this search using different filters such as **Keywords**, **Commodities, Dealers**, etc.

⚠ By default OhioBuys will filter the Bidders / Suppliers by the commodity code associated with the line item. To see additional Bidders and/or Suppliers, or Bidders / Suppliers who have not set their accounts up with that commodity code in OhioBuys, you will need to clear the commodity filter. To do this, click the **X** icon next to the commodity name in either the Commodities field, or the filter. Then click **Search**.



⚠ Please note, OhioBuys requires the selection of at least 1 Bidder or Supplier. If the user would not like to select any individual Bidders and/or Suppliers, search for the Supplier ID associated with the contracting entity (e.g., DAS01) in the Keywords field and select this Supplier in the search results. In order to do this, the chosen Supplier record must have a contact associated with it. Doing so will fulfill the requirement to invite at least 1 Supplier.

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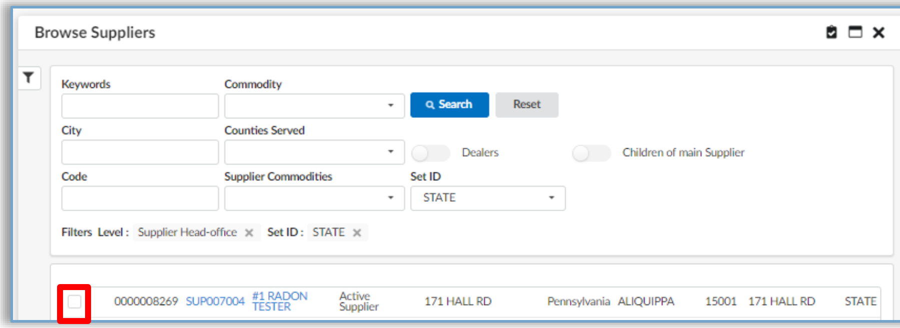
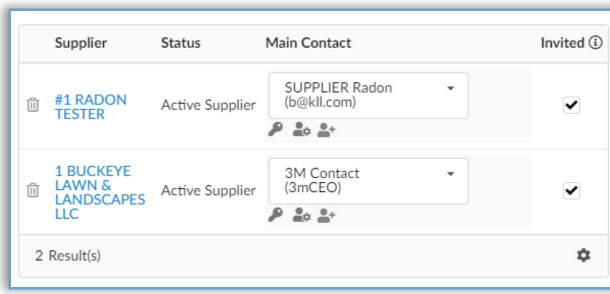
Click the **Checkbox** (☐) icon to select a particular Bidder or Supplier or click the **Checkbox** (☐) icon next to the **Code** header to select all of the displayed Bidders and/or Suppliers.



11

To modify the list of added Bidders and/or Suppliers:



a) Use the **Trashcan** (🗑) icon to remove a Bidder or Supplier from the list of invited Bidders and/or Suppliers.

b) Update the **Main Contact** field with the name of the Bidder or Supplier contact that should receive the invitation to respond – note that the Bidder or Supplier must have a contact in OhioBuys to be invited to participate in the solicitation.

c) Use the **Invited** checkbox to determine whether or not a Bidder or Supplier on the list should be invited to respond to the solicitation.

12

Click **Save**.

▲

If the MBE Set Aside slider is clicked, the solicitation will be flagged as MBE set aside on the Public Solicitations page. Users will only be able to invite MBE Suppliers to respond to the solicitation. Additionally, only registered MBE Suppliers will be able to respond to the Solicitation.

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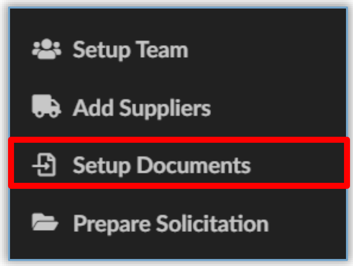
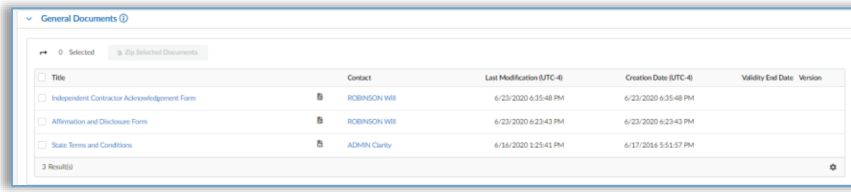
Navigate to the **Setup Documents** tab.



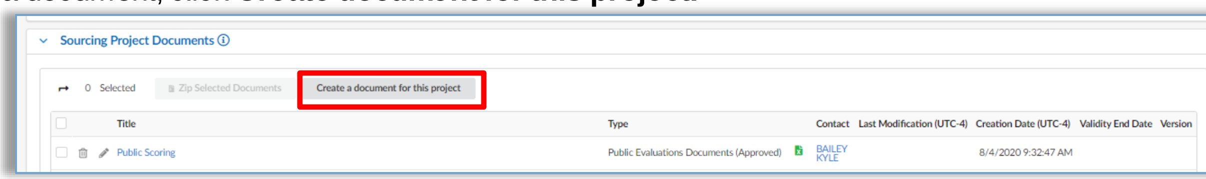
14

In the **General Documents** section, certain State Documents that are standard across solicitations are displayed. To export these documents to a .zip file, click the **Checkbox** (☐) icon to the left of the documents you would like to export. Then click **Zip Selected Documents**.



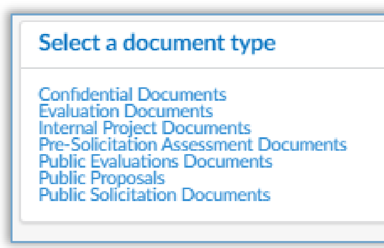
15

In the **Sourcing Documents** section, upload documents specific to this solicitation. To upload a document, click **Create document for this project.**



16

Select a document type from the list provided.



Document types include:

1) Confidential Documents – Documents associated with the solicitation that bear some level of confidentiality
2) Evaluation Documents – Documents relevant to how proposals will be evaluated
3) Internal Project Documents – A catchall for all other relevant internal documents associated with the solicitation
4) Pre-Solicitation Assessment Documents – Documents relevant to the need. This might include a project intake form, risk assessment, data assessment, etc.
5) Public Proposals – Responses to the solicitation that are publicly available – note that these will not be available until after responses have been received
6) Public Solicitation Documents – Relevant solicitation documents that are released to the public

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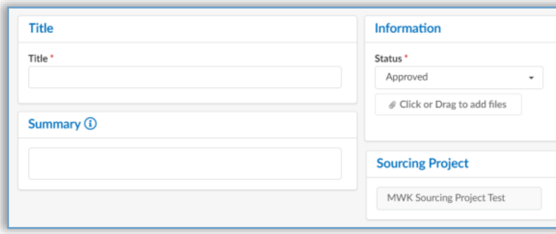
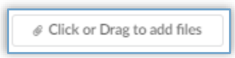
Update the document information by including:



a) **Title**: The name of the document.
b) **Summary**: A description of the document contents.
c) **Status**: Whether the document has ben approved, drafted, blocked, or requires approval.

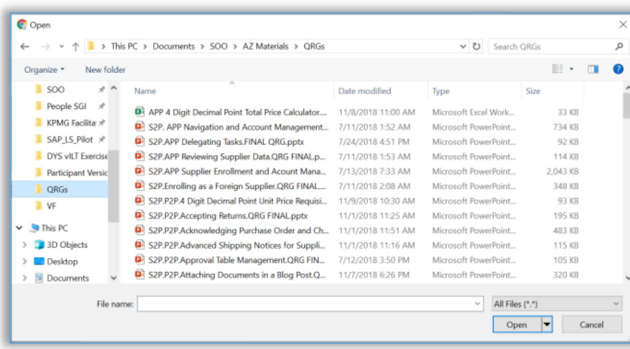
18

Click **Click or Drag to add files** to upload a document.



19

Select a document from your PC and click **Open** to upload it.

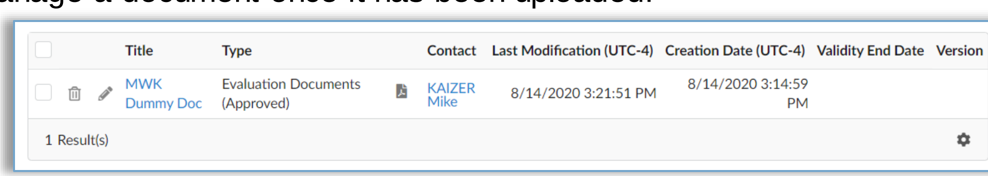


20

Click **Save & Close** to upload the document.

21

To manage a document once it has been uploaded:



a) Click the **Pencil** ( ) icon to edit the document information.

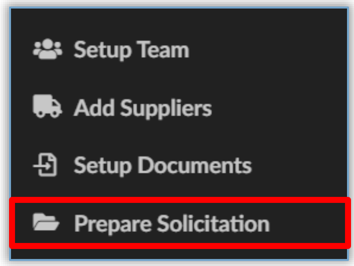
b) Click the **Trashcan** ( ) icon to delete the document.

c) Click the **Checkbox** ( ) icon to select a document, then click **Zip Selected Documents** to export them to a .zip file.

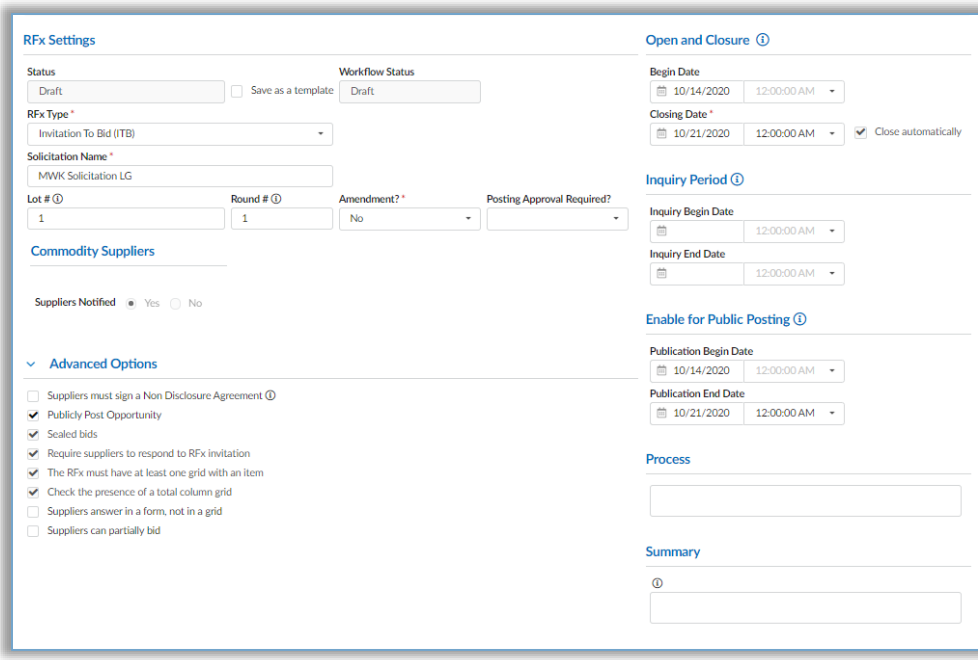
Step-by-Step Instructions for Creating a Public Notice Solicitation

22 Repeat steps 15-21 as needed until you are finished uploading solicitation documents. When you are finished, click **Save & Close**.

23 Navigate to the **Prepare Solicitation** tab.



24 On the **Prepare Solicitation** tab:



a) Select *Public Notice* from the **RFx Type** drop-down menu.

b) If needed, update the **Solicitation Name.** At a bare minimum, this field should include a description of the solicitation that will be understandable to Bidders and/or Suppliers unfamiliar with the State. Please avoid using acronyms.

c) Indicate whether or not the solicitation is an **Amendment.**

d) Indicate the **Open and Closure** dates. These are the dates the solicitation will be available for Suppliers to respond to.

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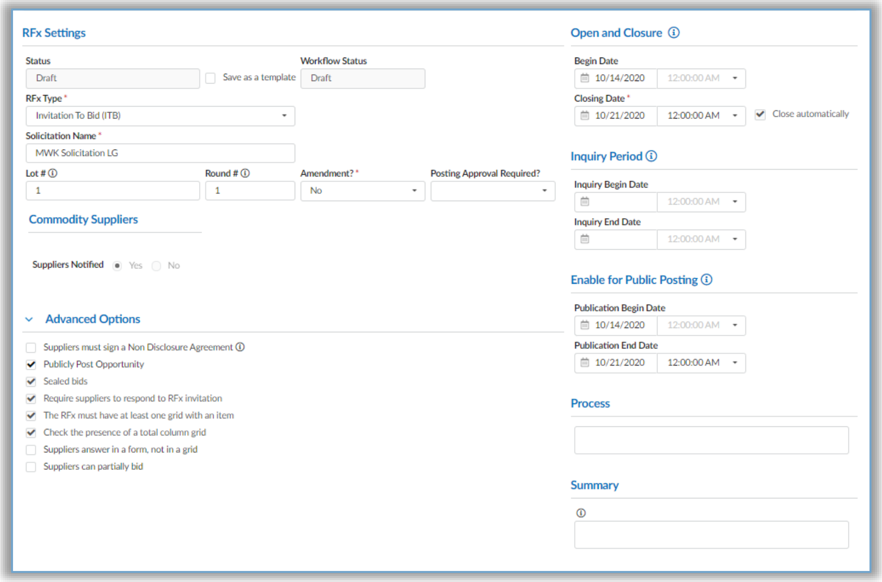
24 On the **Prepare Solicitation** tab:



e) Indicate the **Inquiry Period** – these are the dates during which Suppliers can ask questions about the details of the solicitation. If these dates are left blank, Suppliers will be unable to submit inquiries using OhioBuys.

f) Indicate the **Enable for Public Posting** dates – these are the dates during which the solicitation will be available for viewing on the public portal. Public posting dates should match the Open and Closure Dates and will auto-populate to match the Open and Closure Dates when they are initially filled out.

⚠ If subsequent changes are made to the Open and Closure Dates, the Public Posting Dates will need to be manually updated to match

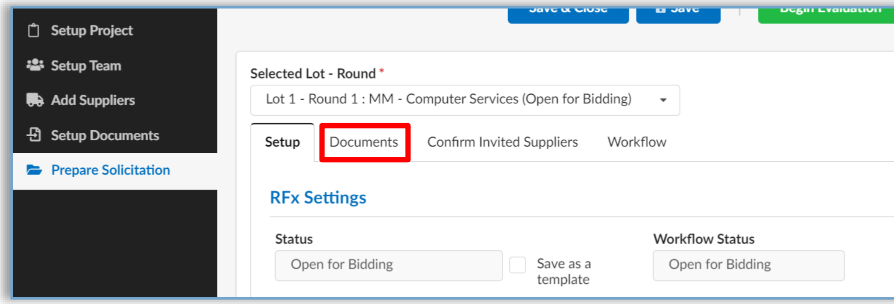
g) Complete the **Process** section to provide a general overview of the selection process that will be used to award the solicitation. It is important to complete this field with as much detail as possible to keep Suppliers effectively informed about the selection process. (e.g., for a Public Notice solicitation, provide instructions on where responses should be submitted since they will be submitted outside of OhioBuys; for a bid/quote, explain that an award will be made to the lowest responsive and responsible Bidder and/or Supplier)

a) Complete the **Summary** section to introduce and provide a general overview of the purpose for the request. It is important to complete this field with a straightforward explanation of what goods/services the solicitation is for, to provide Bidders and/or Suppliers with a high-level understanding of what is being sought. Since this is a public notice solicitation, bids will not be submitted in OhioBuys so users should also use this field to explain to suppliers how they should submit their bids.

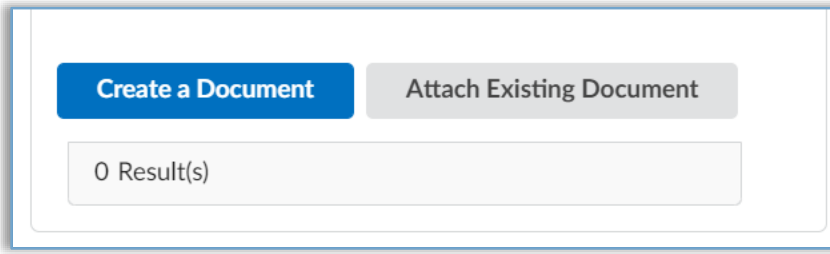
25 Click **Save**.

Step-by-Step Instructions for Creating a Public Notice Solicitation

26 Navigate to the **Documents** header within the **Prepare Solicitation** tab.



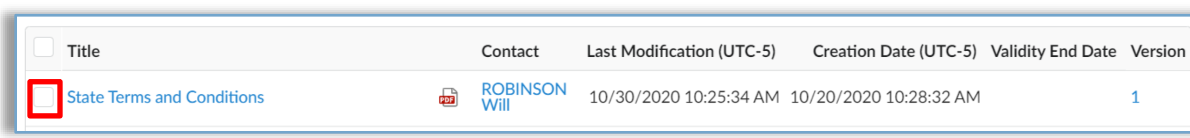
27 In the Documents section of the Prepare Solicitation tab, users can upload additional documents, or attach existing documents from the Setup Documents tab.



⚠ Note that any document added in the Prepare Solicitation tab, regardless of type, will be visible to the public once the solicitation is posted.

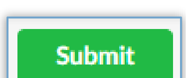
⚠ The process for adding a new document is the same as on the **Setup Documents** tab.

To attach an existing document, click **Attach Existing Document** and indicate the document or documents to be added by clicking the associated **Checkbox** ( ) icon.



When you have selected all of the documents to be added, click **Save & Close**.

28 Review the details of the solicitation you have created. When you are ready, click **Submit**.



If no approvers are assigned, move on to step 29. Otherwise, you will need to wait for any approvers to complete their review prior to continuing.

Step-by-Step Instructions for Creating a Public Notice Solicitation

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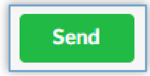
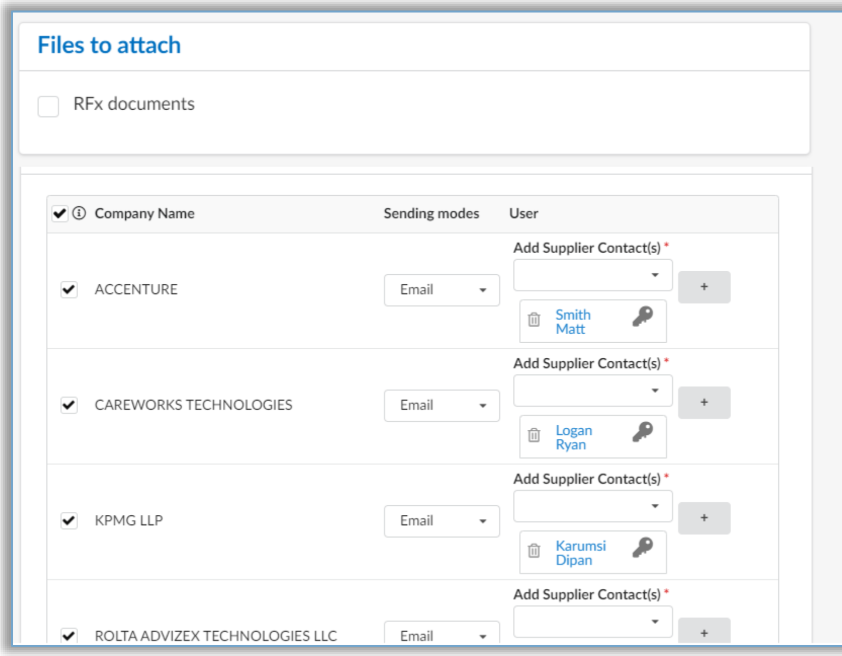
On the **Prepare Solicitation** tab, click **Send**.



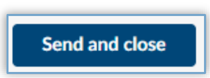
30

Select any relevant **Files to attach** and add any additional **Supplier Contacts** for each of the invited Suppliers.

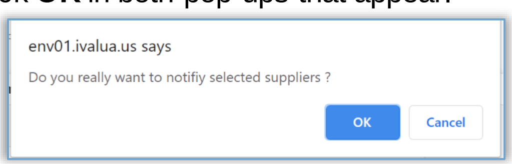


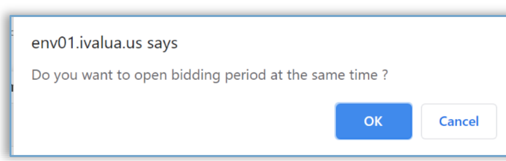
31

Click **Send & Close**.



Click **OK** in both pop-ups that appear.





The solicitation has now been posted and is available for responses. Please note all responses and evaluations for Public Notice solicitations are completed outside of OhioBuys.

OhioBuys

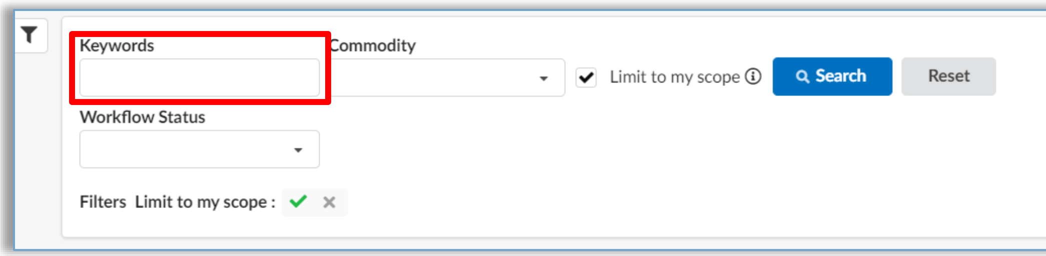
Create a Public Notice Solicitation

Step-by-Step Instructions for Answering Supplier Questions

▲ When a Bidder or Supplier submits an inquiry, the user responsible for the solicitation will receive an email notification and can view the question. They then can "unlock" the question for edit by forwarding. They can forward to any teammate on the team.

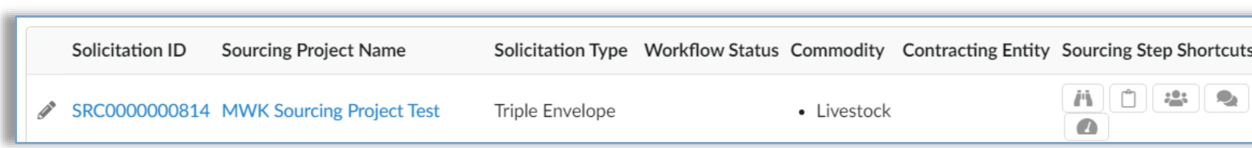
1 Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2 The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search.** By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

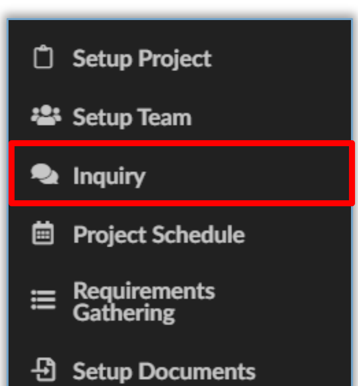


▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** ( ) icon.

3 Open the sourcing project you would like to edit by clicking the **Pencil** ( ) icon.



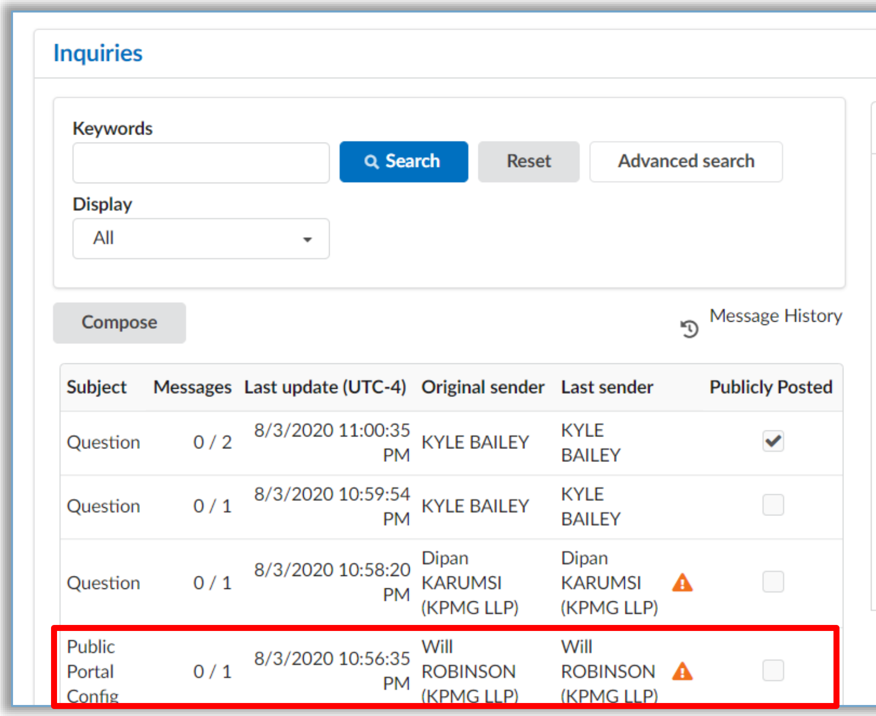
4 Navigate to the **Inquiry** tab.



Step-by-Step Instructions for Answering Supplier Questions

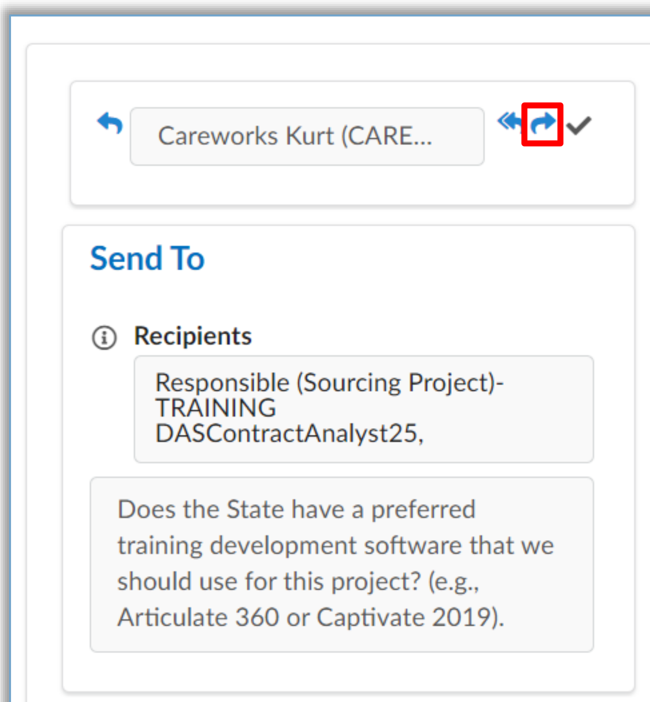
5

The Inquiries page is displayed. Users are able to search for specific questions using keywords. Click anywhere on a question line to open it.



6

The question is displayed. To respond to the question, a user must first click the **Forward** ( ) icon.

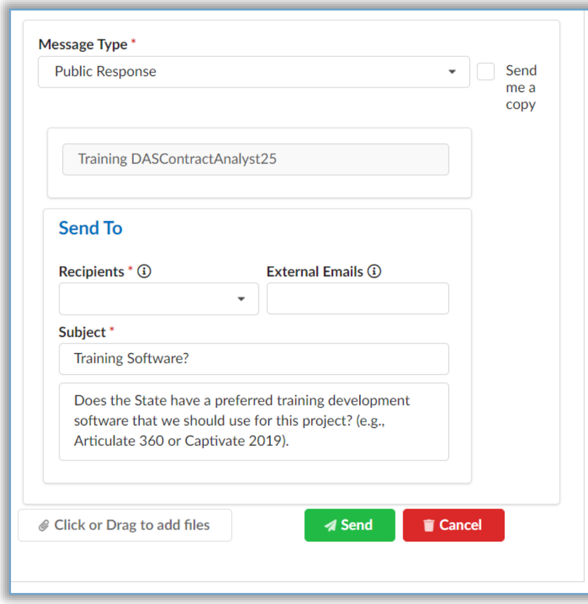


Create a Public Notice Solicitation

Step-by-Step Instructions for Answering Supplier Questions

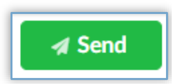
7

Update the **Message Type** to **Public Response**. Doing so will post the Supplier's question publicly so that other Suppliers are able to see the State's response. The user should then select themselves in the **Recipients** field.



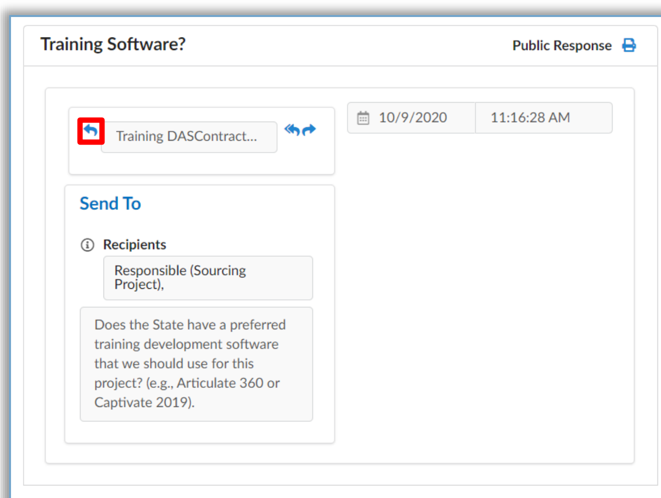
⚠ Clean up the Supplier's question by removing any sensitive or identifying information, as well as correcting any mistakes in spelling or grammar. This will ensure that the question is clear when it is posted to the public.

Once the Supplier's question has been cleaned up, click **Send**.



8

Navigate to the forwarded message and click the **Reply** (↩) icon.



Step-by-Step Instructions for Answering Supplier Questions

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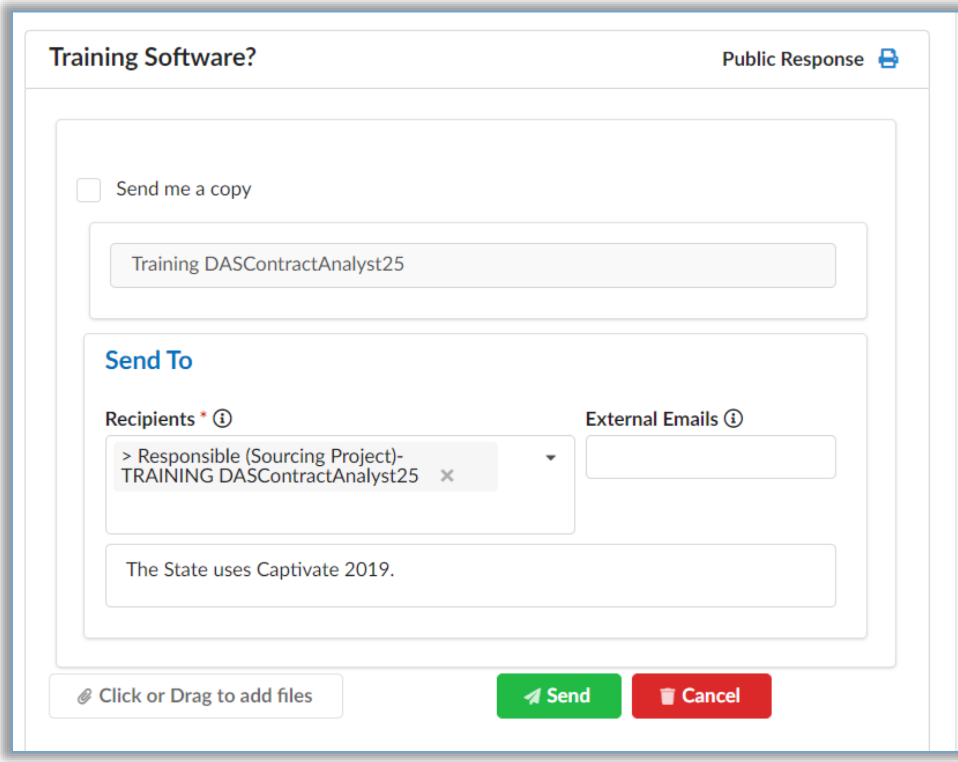
Ensure that the **Message Type** is set to Public Response. Indicate the **Recipients** of the response. You can choose both internal contacts on the project team and Supplier contacts.



⚠ Select **All internal team members** to send a reply to all users in the team tab.

Type the details of your response in the free text entry field. Use the **Click or Drag to add files** button to attach documents as necessary.

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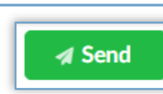
When you are ready, click **Send** to distribute your reply.



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Click **Save** and then click **Post Inquiry to the Public**. This will post publicly all of the questions and answers with the public response type.